
TECHNICAL HANDBOOK FOR
ENVIRONMENTAL HEALTH AND ENGINEERING
VOLUME IV - REAL PROPERTY MANAGEMENT
PART 36 - QUARTERS MANAGEMENT

CHAPTER 36-11 REPORTING REQUIREMENTS AND FORMS

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36-11.1 GENERAL GUIDELINE

The Office of Management and Budget (OMB), General Accounting Office (GAO), and Congressional representatives have exhibited increasing interest in the management of Government quarters. It is the policy of the Public Health Service that quarters utilization and maintenance be managed efficiently and diligently.

Each Housing Office/Delegated Official (HO/DO) must maintain data concerning rental rates, Consumer Price Index (CPI) implementation, maintenance schedules, utility costs, and occupancy data for each quarters unit. Records must be maintained for the current and past two fiscal years.

Additionally, as prescribed by OMB Circular A-45, each agency's headquarters staff maintains a central records system for survey and appraisal results and the subsequent application of rental rates and CPI adjustments.

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36-11.2 CLASSIFICATION AND BACKGROUND DATA

As a basis for appraising and evaluating the local conditions relating to quarters, certain preliminary and background data should first be obtained and recorded as set forth below:

- A. Quarters Classification - Quarters are to be classified within one of two general categories, i.e., housekeeping or nonhousekeeping. Housekeeping quarters may be subclassified as furnished or unfurnished. The policies and procedures prescribed in this Handbook apply to both general categories.
- B. Background Data - Information such as the name of and distance to the nearest established community, classification, condition, and quarters/building identification should be provided to the designated appraiser.

Complete information regarding the construction, age, major renovation, square footage, utilities, appliances, etc. must also be provided.

36-11.3 MANAGEMENT OF SUBSTANDARD QUARTERS UNITS

Quarters that the Agency has designated as substandard described in Chapter 36-5, are not available for occupancy. In addition the Agency has one year in which to take remedial action either razing or upgrading which shall be reported on Form PHS-88. If an agency decides to raze the structure, a Report of Survey must also be performed. In either case, proper documentation must be submitted to the Director, Division of Facilities and Environmental Engineering (DFEE), with the annual report.

36-11.4 REPORTING OF RENTAL RATE CHANGES

The results of surveys and appraisals, including appropriate supporting documentation, must be submitted to and reviewed by the Director, Division of Facilities and Environmental Engineering (DFEE), prior to implementing new rates.

Also, each Area is required to prepare a memorandum notifying the Director, Division of Facilities and Environmental Engineering (DFEE), of the effective date for the annual CPI adjustments. Because OMB Circular A-45 specifies that new rates must take effect on the first full pay period after March 1 of each year, the IHS certification is required no later than March 31 each year.

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36-11.5 REPORTING REQUIREMENTS

Real property inventories which include all IHS-owned and leased quarters units are to be updated semi-annually and forwarded to Division of Facilities and Environmental Engineering, Office of Public Health, Indian Health Service for inclusion in the World-Wide Inventory of Real Property. Changes to the owned real property inventory shall be recorded on Form PHS-88, Real Property Vouchers. This includes disposals, transfers to other agencies, and conversion of quarters to other uses. Expenditures for major renovations to quarters shall be vouchered in the same manner.

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APPENDIX A

COMPUTERIZED RENTAL RATE RECORD

MONTHLY NET RENTAL DETERMINATION

Monthly Base Rental Rate (MBRR)	\$ 557.00
*Current Consumer Price Index (3.3% X MBRR)	\$ 18.38
CPI Adjusted MBRR	\$ 575.00

ADMINISTRATIVE ADJUSTMENTS

Isolation	\$ -4878.00
Amenities (-1% of CPI Adjusted MBRR)	\$ -5.75
Invasion of Privacy	\$ -0.00
Inadequate Size	\$ -0.00
Excessive Size	\$ -0.00
Total Administrative Adjustments	\$ -4883.75

Adjustment Calculation

Total Adjustments	\$ -4883.75
Maximum Allowable Adjustment	\$ -345.00
Net Adjustments to CPI MBRR	\$ -345.00
Net Monthly Base Rental Rate	\$ 230.00

MONTHLY CHARGES FOR RELATED FACILITIES.

\$ 0.00 Refrigerator	\$ 0.00 Range
\$ 3.75 Washer	\$ 3.15 Dryer
\$ 0.00 Dishwasher	\$ 1.95 Freezer
\$ 0.00 Tr Compactor	\$ 0.00 Window AC
\$ 0.00 Microwave	\$ 0.00 Fplce Insert
\$ 0.00 Comm Laundry	\$ 0.00 Comm Freezer
\$ 46.60 Furniture (4 Rms)	\$ 0.00 Wood Stove
\$ 0.00 Electricity	\$ 0.00 Water
\$ 0.00 Natural Gas	\$ 0.00 Sewer
\$ 0.00 LP Gas	\$ 18.80 Trash Removal
\$ 0.00 Fuel Oil/Other	\$ 0.00 Lawn Care
\$ 0.00 Cable/Dish TV	\$ 0.00 Premium Chanls
\$ 0.00 Snow Removal	\$ 0.00 Firewood
\$ 0.00 Swimming Pool	\$ 0.00 Maid Service
\$ 0.00 Hot Tub	\$ 0.00 Lawn Mower
\$ 0.00 Storage Shed	\$ 0.00 Additional Charges
\$ - 0.00 Additional Adjustments	
Total Related Service Charges	\$ 74.25

EXCESSIVE HEATING AND/OR COOLING CREDITS \$ 0.00

CREDITS FOR ELECTRICITY USED

\$ -0.00 Well Pump	\$ -0.00 Sump Pump
\$ -0.00 Base Radio Station	\$ -0.00 Sewage Lift Pump
\$ -0.00 Remote Relay Control Unit	\$ -0.00 Radon Gas Mitigation
Total Electrical Credits	\$ 0.00

QUARTERS DEFICIENCY CHECKLIST (Continued)

FACILITY LOCATION (Name, City & State)					BLDG. NO.	QUARTERS NO.	DATE
II. INTERIOR (Cont'd)	CONDITION				EST. COST OF REPAIR/ REPLACEMENT	REMARKS	
	1	2	3	4			
B. FLOORS							
Structure							
Finish							
Stairs							
C. WALLS							
Structure							
Finish							
Doors							
Windows							
Closets							
Receptacles							
D. KITCHEN, BATH, UTILITY RM.							
Cabinets							
Appliances							
Plumbing							
Fixtures							
Electrical							
Water Heater							
E. BASEMENT							
Damp Proofing							
Ventilation							
F. GARAGE, STORAGE AREA							
Fire Protection							
Usable Storage Capacity							
G. UTILITIES							
Electrical							
Gas							
Sewer							
Water							
Fuel Oil Storage							
H. HEATING EQUIPMENT, PIPING, DUCTWORK							
I. AIR CONDITIONING EQUIPMENT							
J. OTHER (Identify)							
TOTAL							

1. Excellent 2. Good 3. Fair 4. Poor
 PH 068-2
 11-71

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APPENDIX C

PHS-6070-A QUARTERS ASSIGNMENT AND ACCEPTANCE AGREEMENT

U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES
Public Health Service

QUARTERS ASSIGNMENT AND ACCEPTANCE AGREEMENT

AGENCY/BUREAU		INSTALLATION NAME
INSTALLATION NUMBER	STATE	COUNTY
NAME OF OCCUPANT		SOCIAL SECURITY NUMBER
EMPLOYMENT STATUS <input type="checkbox"/> COMMISSIONED CORPS (RANK: _____) <input type="checkbox"/> CIVIL SERVICE (GRADE _____)		
CONTRACTOR'S EMPLOYEE <input type="checkbox"/> YES <input type="checkbox"/> NO	LOCAL HIRE <input type="checkbox"/> YES <input type="checkbox"/> NO	ASSIGNMENT STATUS <input type="checkbox"/> Permanent <input type="checkbox"/> Temporary <input type="checkbox"/> Term

DEPENDENT DATA

SPOUSE'S NAME	EMPLOYMENT STATUS <input type="checkbox"/> Government Employee <input type="checkbox"/> Civil Service <input type="checkbox"/> Commissioned Corps
TOTAL NUMBER OF CHILDREN Number .. Female _____ Number .. Male _____	OTHER DEPENDENTS (Number _____) Relationship _____

QUARTERS DATA

BUILDING NO.	QUARTERS NO.	NET SQUARE FEET	NO. BEDROOMS
SINGLE <input type="checkbox"/> YES <input type="checkbox"/> NO	FAMILY <input type="checkbox"/> YES <input type="checkbox"/> NO	HOUSEKEEPING <input type="checkbox"/> YES <input type="checkbox"/> NO	NONHOUSEKEEPING <input type="checkbox"/> YES <input type="checkbox"/> NO
COMMUNAL KITCHEN <input type="checkbox"/> YES <input type="checkbox"/> NO		ADEQUATE <input type="checkbox"/> YES <input type="checkbox"/> NO If "NO," explain: _____	

FURNISHINGS DATA

ITEM _____	SERIAL NO. _____	INDEX NO. _____
ITEM _____	SERIAL NO. _____	INDEX NO. _____
ITEM _____	SERIAL NO. _____	INDEX NO. _____
ITEM _____	SERIAL NO. _____	INDEX NO. _____
ITEM _____	SERIAL NO. _____	INDEX NO. _____

RENTAL DATA

BASE MONTHLY RATE ..	ELECTRICITY ..	FUEL ..	GARBAGE ..
ADJUSTMENTS ..	WATER ..	SEWER ..	FURNISHINGS ..
ADJUSTED BASE RATE ..	GAS ..	OTHER ..	TOTAL UTILITIES ..
UTILITIES METERED AND BILLED DIRECT TO THE OCCUPANT <input type="checkbox"/> YES <input type="checkbox"/> NO If "NO," explain _____			TOTAL MONTHLY RENTAL RATE \$ _____
			TOTAL BI-WEEKLY RENTAL RATE \$ _____

GENERAL TERMS AND CONDITIONS

The _____ (hereinafter called the "agency") hereby assigns to
to _____ (hereinafter called the "occupant") government quarters described above.

Rent shall be \$ _____ per month, as indicated above. If the occupant is an agency employee, rent shall be payable through salary deductions in accordance with Section 5911(c), Title 5, U.S. Code. If the occupant is not an agency employee, rent shall be payable to _____ by cash collection. The rent shall be subject to automatic periodic adjustments between rental surveys in accordance with the PHS Quarters Management Manual and OMB Circular A-45, utilizing the Department of Labor Rent Series of the Consumer Price Index as the annual rent multiplier. The occupant will be notified in writing at least 30 days in advance of the rent adjustment which shall become effective the first full pay period in February of each year. A new Quarters Assignment and Acceptance Agreement (PHS-6070A) will be required whenever rates are revised pursuant to a rental survey.

If the occupant is a Commissioned Corps member and quarters are adequate, neither rent nor charges for utilities shall be added from the officer's pay. When quarters have been designated inadequate public quarters, the total of the rental rate, plus charges for furniture and utilities (except telephone) will be adjusted, if required, so as not to exceed 75 percent of the member's basic allowance for quarters (OMB Circular A-45, revised).

Occupancy of the subject quarters shall begin on _____. If the occupant is an agency employee, occupancy shall end upon the expiration of the occupant's employment at this location, unless previously terminated at the option of either party upon 30-days written notice. If the occupant is not an agency employee, occupancy shall end on _____, unless previously terminated at the option of either party upon 30-days written notice.

The occupant:

1. agrees to keep the premises in a clean, sightly, and safe condition, and in good and orderly condition. _____ the quarters in a clean
2. agrees to assist and cooperate with the agency in the care and maintenance of the premises. _____ to promptly notify the
3. agrees to make no repairs, alterations, improvements or additions to the premises without the prior written approval of the agency head or his/her delegated official. All alterations made shall become and remain the property of the United States. _____ rized in advance and in
4. agrees to repair at his/her expense, any damages to the premises resulting from reasonable wear and tear. These repairs may be made by the agency, the occupant through a cash payment or payroll deduction. _____ tions so authorized and
5. agrees that no business will be conducted on the premises unless authorized in writing by the agency head or his/her delegated official. _____ of the occupant beyond
6. agrees to maintain the premises as a private residence for himself/herself and his/her legal dependents. The occupant agrees to neither sublet any part or portion of the premises to any person, nor allow any other person or persons to reside on the premises without the prior written consent and approval of the delegated official. _____ ts will be reimbursed by
7. agrees to conduct himself/herself and assure that his/her family and guests conduct themselves in such a manner as not to interfere with agency operations at the installation. _____ n writing by the agency
8. agrees to permit the agency head, or his/her delegated official, to enter the premises in order to inspect, make repairs, or take such other action as may be reasonable or necessary. The agency shall give notice of intent to enter the premises as it deems reasonable and practical under the circumstances.
9. agrees to pay normal rent for quarters during temporary periods of absence. The occupant is responsible for rent, furnishings, and utility charges until such time as the unit is completely vacated and cleaned. Charges will continue until a PHS Quarters Termination Record (PHS-6070B) and Quarters Deficiency Checklist (PHS-6068-1) have been executed, signed, and any discrepancies resolved. The occupant must receive the above quarters clearances prior to release from service and final payment of salary.

This agreement is subject also to any additional Terms and Conditions applicable to the installation and its quarters as set forth on exhibit(s) _____ and _____, attached hereto and made a part thereof.

DATE

AGENCY

I hereby certify that I accept the Terms and Conditions stated in this Quarters Assignment and Acceptance Agreement and that I have participated in the pre-occupancy inspection of the quarters.

OCCUPANT

INSTRUCTIONS FOR THE PREPARATION OF FORM PHS 6070A
Quarters Assignment & Acceptance Agreement

DHEW-PHS -Enter the name of the appropriate agency, IHS.

INSTALL NAME-Enter the name of the station and State where the quarters are located.

OCCUPANT NAME-Enter the name of employee assigned quarters.

GRADE/RANK-Enter civil service grade, wage board grade, or commissioned officer rank of assigned employee, e.g., GS-II, WG-10, CO-05.

SOC. SEC. NO.-Enter social security number of the occupant assigned to quarters.

EFFECTIVE DATE-Enter date of assignment.

ASSIGNMENT-Indicate whether quarters are being assigned on a permanent or temporary basis.

LOCAL HIRE-Indicate whether or not occupant is a local hire.

BASIC RENTAL RATE-Enter the rental value of employee quarters comparable to private rental in representative community established by appraisal and CPI adjustment.

ADJUSTMENTS-Enter the value of allowable adjustments, i.e., mileage, amenities, etc.

ADJUSTED BASIC RATE-Enter the adjusted basic rental rate (rate minus adjustments).

ELECTRIC, WATER, GAS, ETC.--Enter the appropriate charges for utilities that are to be provided by the Government. Enter "OCC.PAY" for utilities that are to be paid direct to the utility companies by the occupant.

FURNISHINGS-Enter charge for furnishings, excluding range and refrigerator.

NET MONTHLY RENTAL RATE-Enter the net monthly rental rate (adjusted basic rate plus charges for utilities and furnishings).

BI-WEEKLY NET RENTAL RATE-Enter the bi-weekly net rental rate. (The bi-weekly net rental rate is arrived at by multiplying the net monthly rate by .04615.)

BLDG. & QTRS. NO.-Enter appropriate building and quarters numbers. Be consistent with numbers used in the Real Property inventory.

HSK_____NONHSK_____ Indicate whether or not there is a kitchen.

SUBSTANDARD & INADEQUATE-Indicate whether or not the quarters have been declared

substandard and/or inadequate.

NO. ROOMS-Enter the number of rooms used for living purposes which are included in the computation of the net square feet of floor space.

NO. BEDROOMS-Enter the number of rooms designed for use as bedrooms even though the occupant may not use the rooms as bedrooms.

NET SQUARE FEET-Enter the net floor area in square feet of living space (exclude garages, unfinished attics, basement space, or service and storage areas in lieu of basement).

FURNISHINGS DATA-Enter any furnishings provided by name, serial number, index number, e.g., refrigerator, range, freezer, washer, etc.

SIGNATURE OF HOUSING OFFICER AND OCCUPANT: Part A. Assignment-Occupant and housing officer must sign after the occupant has read the established policies and procedures.

EXCEPTIONS--Enter any exceptions. (Exceptions are any outstanding repair, cleaning, etc., that occupant should have corrected before vacating.)

NOTE: Privacy act restrictions require that this form be filed only by Building/Quarters number and not cross-filed by name. In addition, any requests for information contained on the form should be referred to the Personnel/Payroll office where the data can be made available under the Privacy Act regulations.

The occupant:

- 1) agrees to keep the premises in a clean, sightly, and safe condition, and upon vacating, to leave the quarters in a clean and orderly condition.
- 2) agrees to assist and cooperate with the agency in the care and maintenance of the premises and to promptly notify the housing officer of any damage or need for repairs to the premises.
- 3) agrees to make no repairs, alterations, improvements or additions to the premises unless authorized in advance and in writing by the agency head or his/her delegated official. All alterations, improvements or additions so authorized and made shall become and remain the property of the United States.
- 4) agrees to repair at his/her expense, any damages to the premises resulting from the neglect of the occupant beyond reasonable wear and tear. These repairs may be made by the agency, at its option, and the costs will be reimbursed by the occupant through a cash payment or payroll deduction.
- 5) agrees that no business will be conducted on the premises unless authorized in advance and in writing by the agency head or his/her delegated official.
- 6) agrees to maintain the premises as a private residence for himself/herself and his/her legal dependents. The occupant agrees to neither sublet any part or portion of the premises to any person, nor allow any other person or persons to reside on the premises without the prior written consent and approval of the delegated official.
- 7) agrees to conduct himself/herself and assure that his/her family and guests conduct

themselves in such a manner as not to interfere with agency operations at the installation.

8) agrees to permit the agency head, or his/her delegated official, to enter the premises in order to inspect, make repairs, or take such other action as may be reasonable or necessary. The agency shall give notice of intent to enter the premises as it deems reasonable and practical under the circumstances.

9) agrees to pay normal rent for quarters during temporary periods of absence. The occupant is responsible for rent, furnishings, and utility charges until such time as the unit is completely vacated and cleaned. Charges will continue until a PHS Quarters Termination Record (PHS-6070B) and Quarters Deficiency Checklist (PHS-6068-1) have been executed, signed, and any discrepancies resolved. The occupant must receive the above quarters clearances prior to release from service and final payment of salary.

This agreement is subject also to any additional terms and conditions applicable to the installation and its quarters as set forth on exhibit(s)____and _____, attached hereto and made a part thereof.

Date: _____
_____ Agency

I certify that I accept the Terms and Conditions stated in this Quarters Assignment and Acceptance Agreement and that I have participated in the pre-occupancy inspection of the quarters.

Date: _____
_____ Occupant

Distribution: Employee/occupant; Installation Mgr.; DHFP/OM/PHS

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APPENDIX D

PHS-6070-B QUARTERS TERMINATION RECORD

PHS-6070B
(rev. 6/85)

U.S. PUBLIC HEALTH SERVICE
QUARTERS TERMINATION RECORD

DHHS-PHS: _____

STATION: _____

STATE: _____

OCCUPANT NAME: _____

SOC. SEC. NO.: _____

EFFECTIVE DATE: _____

BI WEEKLY/MONTHLY NET RENTAL RATE: _____

BLDG. NO.: _____

QTRS NO.: _____

EXCEPTIONS: _____

I certify that the above named occupant has been cleared of quarters and relieved of responsibility except as noted under exceptions.

Signature of Housing Officer Date

Signature of Occupant Date

Distribution: Employee/Occupant; Installation Mgr; Payroll; DHFP/OM/PHS

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APPENDIX E

EXCESSIVE HEATING/COOLING JUSTIFICATION

U.S. PUBLIC HEALTH SERVICE
EXCESSIVE HEATING/COOLING JUSTIFICATION

AGENCY CODE:

INSTALLATION NUMBER:

PREPARED BY:

DATE PREPARED:

OCCUPANT'S NAME:

SOC. SEC. NO.:

ADDRESS OF QUARTERS:

COMPUTATION OF DEDUCTION

1. A. Heating/Cooling Season B. Official A/C. Zone (check one)

_____ yes _____ no

_____ thru _____ = _____
(Month) (Month) (# of months)

2. Average Seasonal Heating/Cooling Costs (Subject Quarters)

\$ _____

3. Seasonal Heating/Cooling Cost (Subtract line 3 from line 2)

Average Cost: \$ _____

Plus 25% : \$ _____

Total: \$ _____

4. Excessive Seasonal Heating/Cooling Cost

(Subtract line 3 from line 2)

\$ _____

5. Average Monthly Heating/Cooling

(Divide line 4 by 12 months)

\$ _____

CERTIFICATION: The heating/cooling costs for the above Quarters have been compared with those of comparable housing and adequate documentation, including necessary receipts, have been provided by the tenant. Based upon comparability and documentation a heating/cooling deduction is _____ is not _____ allowable, as indicated above.

Date Filed: _____

Approved/Concurred by:

Date: _____

Name and Title

EXCESSIVE HEATING/COOLING JUSTIFICATION
INSTRUCTIONS

1. No deduction will be allowed for any Quarters that has adequate insulation as specified the Regional Survey data or by independent appraisal.
2. If Quarters are air conditioned, indicate whether Quarters are in the official air conditioning zone, as determined by the General Services Administration.

Normally deduction will be computed based only on actual months of heating season. Full 12-month period can be allowed only if Quarters are also in official air conditioning zone.

4. Enter on line 2 the total costs of heating/cooling subject Quarters during season.
5. Enter on line 3 the total cost of heating/cooling comparable well insulated housing during season plus 25%.
6. Subtract line 3 from line 2. If a negative balance results, no deduction can be allowed. If a positive balance results, the amount on line 4 is divided by 12 to determine the monthly reduction in the rental rate.

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APPENDIX F
AMENITIES SCHEDULE

U.S. PUBLIC HEALTH SERVICE

AMENITIES SCHEDULE

Agency/Bureau: _____ Installation Name: _____
Location: _____ Building/Quarters No. _____
Prepared by: _____ Date: _____

Considerations: Ideally, appraisals and regional surveys should compare private housing and Government furnished housing which have similar physical characteristics and economic conditions. However, living conditions at the locations of some Government housing are not always the same as those found in or immediately adjacent to the survey or appraisal communities. In such communities, the amenities listed below are generally, but not always, present and their contributory value included in the base rent. The lack of availability of any of these items at the quarters location represents a generally less desirable condition which would be reflected as a negative percentage adjustment to the base rental rate. Similarly, an upwards percentage adjustment should be made in the base rental rate for quarters possessing site amenities which are not present in the survey or appraisal communities used to establish the base rent.

Discrepancies between available amenities noted in the survey and those located at the Government quarters should be noted on this schedule, the total of which are to be transferred to the Section B. of the Rental Rate Record, form PHS 6069.

- | | |
|--|-------------------|
| 1. Reliability and adequacy of water supply. | (+ or - 3%) _____ |
| 2. Reliability and adequacy of electric service. | (+ or - 3%) _____ |
| 3. Reliability and adequacy of fuel for heating,
cooling and cooking. | (+ or - 3%) _____ |
| 4. Reliability and adequacy of police protection. | (+ or - 3%) _____ |
| 5. Reliability and adequacy of fire protection. | (+ or - 3%) _____ |
| 6. Reliability and adequacy of sanitation service. | (+ or - 3%) _____ |
| 7. Reliability and adequacy of telephone service. | (+ or - 1%) _____ |
| 8. Excessive noise and/or odors. | (+ or - 3%) _____ |
| 9. Miscellaneous improvements (paved roads,
sidewalks, or street lights). | (+ or - 1%) _____ |

Total Amenities _____

*See Appendix 2-OMB Circular A-45, for details on site amenities.

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APPENDIX G

PHS-88 REAL PROPERTY VOUCHER

VOUCHER NUMBER

DATE _____

2. CITY OR TOWN

4. STATE OR COUNTRY

8. IDENTITY NUMBER

98. CLASSIFICATION

☐ REPAIR OR MAINTENANCE

DATE	DESCRIPTION OF ACTION OR WORK PERFORMED	PROJECT COST	CHANGE IN ASSET VALUE	
			INCREASE	DECREASE

DATE

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APPENDIX H

ISOLATION ADJUSTMENT COMPUTATION

ISOLATION ADJUSTMENT COMPUTATION

The monthly adjustment for isolation, is computed as follows:

Step 1. Determine the one-way distance in miles (from the quarters to the nearest established community) for each affected category of transportation listed in Figure 1. Enter mileage(s) in the appropriate block(s) under Column B.

Step 2. Multiply mileage figures entered in Column B by point values listed in Column A for each affected category of transportation to produce one-way points for each category. Add 29 points to the category 4 subtotal and 27 points to the category 5 subtotal to reflect relative differences in cost or time by use of these modes of travel.

Step 3 Add all categories of one-way points in Column C to produce total one-way points. (The total must exceed 30 points or there is no adjustment for isolation).

<u>Category of Travel</u>	<u>Column A Point Value</u>	Figure 1	
		<u>Column B One-Way Miles</u>	<u>Column C One-Way Points</u>
(1) Paved road or rail	1.0 x	_____	= _____
(2) Unpaved but improved road	1.5 x	_____	= _____
(3) Unimproved road	2.0 x	_____	= _____
(4) Water, snowmobile, pack animal, foot or other special purpose conveyance	2.5 x	_____ +29	= _____
(5) Air	4.0 x	_____ +27	= _____
TOTAL ONE-WAY POINTS			_____

Step 4. Calculate the Isolation Adjustment Factor (IAF) using the following formula: 2 (to reflect round trip points) times 4 (to reflect number of trips per month) time \$x.xxx (GSA's current automobile mileage allowance). For example, the GSA mileage allowance, as of January, 1996 OMB Circular A-45, is \$0.31, resulting in a IAF of 1.6 (rounded to the nearest tenth).

ISOLATION ADJUSTMENT FACTOR = 2.0

Step 5. Multiply total one-way points (sum of Column C) by the Isolation Adjustment Factor to produce the monthly adjustment for isolation (and round to the nearest whole dollar).

MONTHLY ADJUSTMENT = _____

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APPENDIX I

5 U.S.C. 5911
SUBCHAPTER 11-QUARTERS

SUBCHAPTER II-QUARTERS

5 § 5911. Quarters and facilities; employees in the United States

(a) For the purpose of this section--

(1) "Government" means the Government of the United States;

(2) "agency" means an Executive agency., but does not include the Tennessee Valley Authority;

(3) "employee: means an employee of an agency;

(4) "United States: means the several States, the District of Columbia, and the territories and possessions of the United States including the Commonwealth of Puerto Rico;

(5) "quarters" means quarters owned or leased by the Government; and

(6) "facilities" means household furniture and equipment, garage space, utilities, subsistence, and laundry service

(b) The head of an agency may provide, directly or by contract, an employee stationed in the United States with quarters and facilities, when conditions of employment or of availability of quarters warrant the action.

© Rental rates for quarters provided for an employee under subsection (b) of this section or occupied on a rental basis by an employee or member of a uniformed service under any other provision of statute, and charges for facilities made available in connection with the occupancy of the quarters, shall be based on the reasonable value of the quarters and facilities to the employee or member concerned, in the circumstances under which the quarters and facilities are provided, occupied, or made available. The amounts of the rates and charges shall be paid by, or deducted from the pay of, the employee or member of a uniformed services, or otherwise changed against him in accordance with law. The amounts of payroll deduction for the rates and charges shall remain in the applicable appropriation or fund. When payment of the rates and charges is made by other than payroll deductions, the amounts of payment shall be credited to the Government as provided by law.

(d) When, as an incidental service in support of a program of the Government, quarters and facilities are provided by appropriate authority of the Government to an individual other than an employee or member of a uniformed service, the rates and charges therefore shall be determined in accordance with this section. The amounts of payment of the rates and charges shall be credited to the Government as provided by law.

(e) The head of the local agency may not require an employee or member of a uniformed service to occupy quarters on a rental basis, unless the agency head determines that necessary service cannot be rendered, or that property of the Government cannot adequately be protected, otherwise.

(f) The President may prescribe regulations governing the provision, occupancy, and availability of quarters and facilities, the determination of rates and charges therefore, and other related matters, necessary and appropriate to carry out this section. The head of each agency may prescribe regulations, not inconsistent with the regulations of the President, necessary and appropriate to carry out the functions of the agency head under this section.

(g) Subsection (c) of this section does not repeal or modify any provision of statute authorizing the provision of quarters or facilities, either without charge or at rates or charges specially fixed by statute.

Pub.L.89-554, Sept.6, 1966, 80 Stat. 508.

Historical and Revision Notes

Derivation	United States Code	Revised Statutes and Statutes at Large
(a)	5 U.S.C. 3121	Aug. 20, 1964, Pub.L. 88-159, § 1, 78 Stat. 507
(b)	5 U.S.C. 3122	Aug. 20, 1964, , Pub.L. 88-159, § 1, 78 Stat. 507
©	5 U.S.C. 3123	Aug. 20, 1964, , Pub.L. 88-159, § 1, 78 Stat. 507
(d)	5 U.S.C. 3124	Aug. 20, 1964, , Pub.L. 88-159, § 1, 78 Stat. 507
(e)	5 U.S.C. 3125	Aug. 20, 1964, , Pub.L. 88-159, § 1, 78 Stat. 507
(f)	5 U.S.C. 3126	Aug. 20, 1964, , Pub.L. 88-159, § 1, 78 Stat. 508
(g)	5 U.S.C. 3127	Aug. 20, 1964, , Pub.L. 88-159, § 1, 78 Stat. 508

Explanatory Notes

In subsection (a) (2), the term “Executive agency” is coextensive with and substituted for “each executive department of the Government,” “each agency or Independent establishment in the executive branch of the Government”, each corporation owned or controlled by the Government”, and “the General Accounting Office”. In view of the definition of “Executive agency” in section 105.

In subsection (a) (3), the term “employee” is substituted for “civilian officer or employee” in view of the definition of “employee” in section 2100.

Subsection (a) (7) of former section 3121 is omitted as unnecessary in view of the definition of “uniformed services in section 2101.

Standard changes are made to conform with the definitions applicable and the style of this title as outlined in the preface to the report.

Delegation of Functions. Authority of the President under subsec (f) of this section to lease the regulations provided for therein (relating to the provision, occupancy, and availability of quarters and facilities, the determination of rates and chargers therefor and other related matters as are necessary and appropriate to carry out the provisions of this section) delegated to the Director of the Office of Management and Budget, see section 9 (I) of Ex. Ord. No. 1100, July 22, 1971, 36 F.R., 12747, set out as a note under section 301 of Title 3, The President.

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APPENDIX J

OPM SF-50 B FOR VOLUNTEER DOCUMENTATION

NOTIFICATION OF PERSONNEL ACTION

1. Name (Last, First, Middle)		2. Social Security Number	3. Date of Birth	4. Effective Date
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FIRST ACTION		SECOND ACTION	
5-A. Code	5-B. Nature of Action	6-A. Code	6-B. Nature of Action
5-C. Code	5-D. Legal Authority	6-C. Code	6-D. Legal Authority
5-E. Code	5-F. Legal Authority	6-E. Code	6-F. Legal Authority

FROM: Position Title and Number					15. TO: Position Title and Number						
9. Pay Plan	9. Occ. Code	10. Grade/Level	11. Step/Rate	12. Total Salary	13. Pay Basis	16. Pay Plan	17. Occ. Code	18. Grade/Level	19. Step/Rate	20. Total Salary/Award	21. Pay Basis
Basic Pay		12B. Locality Adj.	12C. Adj. Basic Pay	12D. Other Pay		20A. Basic Pay		20B. Locality Adj.	20C. Adj. Basic Pay	20D. Other Pay	
Name and Location of Position's Organization						22. Name and Location of Position's Organization					

EMPLOYEE DATA				24. Tenure				25. Agency Use		26. Veterans Preference for RIF	
Veterans Preference				0 - None 1 - Permanent				2 - Conditional 3 - Indefinite		<input type="checkbox"/> YES <input type="checkbox"/> NO	
1 - None 2 - 5-Point 3 - 10-Point/Disability 4 - 10-Point/Compensable 5 - 10-Point/Other 6 - 10-Point/Compensable/30%				28. Annuitant Indicator				29. Pay Rate Determination			
FGLI				31. Service Comp. Date (Leave)				32. Work Schedule			
Retirement Plan				33. Part-Time Hours Per Biweekly Pay Period				37. Bargaining Unit Status			
POSITION DATA				35. FLSA Category				36. Appropriation Code			
Position Occupied				E - Exempt N - Nonexempt							
1 - Competitive Service 2 - Excepted Service 3 - SES General 4 - SES Career Reserved				39. Duty Station (City - County - State or Overseas Location)							
Duty Station Code											

AGENCY DATA		41.	42.	43.	44.
Remarks					

Employing Department or Agency			50. Signature/Authentication and Title of Approving Official		
Agency Code	48. Personnel Office ID	49. Approval Date			

NOTICE TO EMPLOYEE

is your copy of the official notice of a personnel action. Keep it with your records because it could be used to make employment, pay, and qualifications decisions about you in the future.

The Action

- Blocks 5-B and 6-B describe the personnel action(s) that occurred.
- Blocks 15-22 show the position and organization to which you are assigned.

Pay

- When the personnel action is an award or bonus, block 20 shows the amount of that one-time cash payment. When the action is not an award or bonus, block 12 shows your former total annual salary, and block 20 shows your new total annual salary (block 20C plus 20D). The amounts in blocks 12 and 20 do not include any one-time cash payments (such as performance awards and recruitment or relocation bonuses) or payments that may vary from one pay period to the next (such as overtime pay), or other forms of premium pay.
- Block 20A is the scheduled amount for your grade and step, including any special salary rate you receive. It does not include any locality-based pay. This rate of pay serves as the basis for determining your rate of pay upon promotion, change to a lower grade, or reassignment, and is used for pay retention purposes.
- Block 20B is the annual dollar amount of your Interim Geographic Adjustment or, beginning in 1994, your locality-based comparability payment.
- Block 20C is your Adjusted Basic Pay, the total of blocks 20A and 20B. It serves as the basis for computing your retirement benefits, life insurance, premium pay, and severance pay.
- Block 20D is the total dollar amount of any Retention Allowances, Supervisory Differentials, and Staffing Differentials that are listed in the remarks block. These payments are made in the same manner as basic pay, but are not a part of basic pay for any purpose.

Block 24 – Tenure

- Describes the nature of your appointment and is used to determine your rights to a reduction in force (RIF). Tenure groups are explained in more detail in subchapter 26 of FPM Supplement 296-33 and RIF is explained in FPM Supplement 351-1; both should be available for review in your personnel office.

Block 26 – Veterans Preference for RIF

- Indicates whether you have preference for reduction-in-force purposes.

Block 30 – Retirement Plan

- FICA —Social Security System
- CS —Civil Service Retirement System
- CS-Spec —Civil Service Retirement System for law enforcement and firefighter personnel
- FS —Foreign Service Retirement and Disability System
- FERS —Federal Employees' Retirement System
- FERS-Reserve Tech —Federal Employees' Retirement System for National Guard Reserve Technicians
- FERS-ATC —Federal Employees' Retirement System for Air Traffic Controllers
- FERS-Spec —Federal Employees' Retirement System for law enforcement and firefighter personnel
- FSPS —Foreign Service Pension System

Block 31 – Service Computation Date (Leave)

- Shows when your Federal service began unless you have prior creditable service. If so, this date is constructed to include your total years, months and days of prior creditable civilian and military service.
- Full-time employees with fewer than 3 years of service earn 4 hours of annual leave each pay period; those with 3 or more years but less than 15 years earn 6 hours each pay period; and those with 15 or more years earn 8 hours each pay period.
- Your earnings and leave statement or your time and attendance card will show the rate at which you earn leave and your current unused leave balance.

Block 32 – Work Schedule

- Your work schedule is established by your supervisor.
- A full-time employee works on a prearranged scheduled tour of duty that is usually 40 hours per week. A part-time employee has a prearranged scheduled tour of duty that is usually between 16 and 32 hours per week. An intermittent employee has no prearranged scheduled tour of duty and works when needed.
- Full-time and part-time employees whose appointments are for 90 days or more are usually eligible to earn annual leave; intermittent employees are not.
- Seasonal employees work on an annually recurring basis for periods of less than 12 months each year; they may have a full-time, a part-time, or an intermittent schedule during their work season.
- On-call employees work during periods of heavy workload and are in pay status for at least 6 months of each year; they may have either a full-time or a part-time schedule when they are in pay status.

Block 33 – Part-time Hours Per Biweekly Pay Period

- Indicates the number of hours a part-time employee is scheduled to work during a two-week pay period.

Block 34 – Position Occupied

- Identifies the employment system under which you are serving — the Competitive Service, the Excepted Service, or the Senior Executive Service (SES).
- The employment system determines your eligibility to move to other jobs in the Federal service, your rights in disciplinary and adverse actions, and your eligibility for reemployment if you leave Federal service.

Block 35 – FLSA Category

- Exempt employees are not covered by the minimum wage and overtime law (the Fair Labor Standards Act); nonexempt employees are covered.

Block 37 – Bargaining Unit Status

- Identifies a bargaining unit to which you belong, whether or not you are actually a member of a labor organization. Code "7777" indicates you are eligible but not in a bargaining unit; code "8888" indicates you are ineligible for inclusion in a bargaining unit.

Blocks 38 and 39 – Duty Station

- Identifies the city, county, and state or the overseas location, where you actually work.

OTHER INFORMATION

- If your appointment entitles you to elect health benefits or life insurance, and you have not been provided materials explaining the programs available and the enrollment forms, contact your personnel specialist.
- Your personnel specialist will also tell you if your position is covered by an agreement between an employee organization (union) and your agency. If you are eligible to and elect to join an employee organization, you can

elect to have your dues withheld from your salary.

- If you have questions or need more information about your rights and benefits, ask your supervisor or your personnel office.
- Definitions for any coded data in Blocks 1-24, 27-39 and 45-50 may be found in Federal Personnel Manual Supplement 292-1.

It is your responsibility to read all the information on the front of this notice and tell your personnel office immediately if there is an error in it.

Subchapter 33. Documentation of Volunteer Service

Contents

S33-1. Coverage

S33-2. Definitions

S33-3. ♦ Documentation of Volunteer Service ♦

S33-4. ♦ Official Personnel Records ♦

★★★

<i>For related information on</i> Limitations on acceptance of voluntary service.....	<i>See</i> Chapter 308, Chapter 311, S1-4c
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Subchapter 33. Documentation of Volunteer Service

♦ S33-1. Coverage.

This subchapter provides instructions for documenting service performed without compensation by persons who do not receive a Federal appointment.

S33-2. Definitions.

a. *Student volunteer service* is service performed, with the permission of the institution at which the student is enrolled, as part of an agency program established for providing educational experience for the student. FPM chapter 308 explains the conditions under which the student volunteer program operates.

b. *Other volunteer service*. Service under volunteer programs for persons other than students is defined in the individual laws and regulations authorizing those programs.

S33-3. Documentation of Volunteer Service.

Volunteers do not receive Federal appointments, so their service is not reported to the Central Personnel Data File (CPDF) and the personnel action instructions in subchapters 1-32 of this supplement are not applicable. However, because volunteers under some programs are considered to be Federal employees for specific purposes (such as injury compensation) and because volunteers may wish to use their service as qualifying experience in the future, a record must be made of the service.

a. *Agency agreements with OPM*. Agencies that have negotiated agreements with OPM's Office of Workforce Information concerning the way in which volunteer service will be documented, must follow the instructions in those agreements. As of 01/01/88 agreements are in effect with:

Forest Service (agreement dated 03/03/82)
Fish and Wildlife Service (agreement dated 10/12/82)
National Park Service (agreement dated 12/23/82)
Bureau of Land Management (agreement dated 09/01/83)
Public Health Service (agreement dated 08/15/86)

b. *Student volunteers*. For student volunteers serving under the authority of 5 U.S.C. 3111, the beginning and ending of the service must be documented on an SF 50 which shows, in the appropriate blocks, the information below:

(1) *Beginning of service*

Name

DOB

SSN

NOA—Volunteer Service—without compensation

Remarks—"Volunteer is expect to serve: (list days and hours per week)."

"Under 5 U.S.C. 3111, Student Volunteer is NOT a Federal employee for any purposes other than injury compensation and laws related to the Tort Claims Act. Service is not creditable for leave or any other employee benefits."

(2) *End of service*

Name

DOB

SSN

NOA—Termination of Volunteer Service

Remarks—"Total service: (list hours or days rendered between beginning and ending dates of the volunteer period.)"

"Under 5 U.S.C. 3111, Student Volunteer is NOT a Federal employee for any purposes other than injury compensation and laws related to the Tort Claims Act. Service is not creditable for leave or any other employee benefits."

c. *Other Volunteers*. The beginning and ending of service must be documented on an SF 50 which shows, in the appropriate blocks, the information below:

(1) *Beginning of service*

Name

DOB

SSN

NOA—Volunteer service—without compensation

LA—(enter the law or regulation under which the program is authorized)

Remarks—"Volunteer is expected to serve: (list days and hours per week.)"

"Volunteer service is NOT creditable for leave or any other employee benefits."

(2) *Ending of service*

Name

DOB

SSN

NOA—Termination of volunteer service

LA—(enter the law or regulation under which the program is authorized)

Remarks—"Total service: (enter hours or days rendered between beginning and ending days of the volunteer period.)"

"Volunteer service is NOT creditable for leave or any other employee benefits."

In addition, both SFs 50 should carry a remark, similar to the one used for student volunteers, to explain for

which purposes, if any, the volunteer is considered to be a Federal employee.

S33-4. Official Personnel Records.

Agencies that have negotiated agreements concerning their volunteer service must follow the instructions in those agreements to maintain records of volunteers covered by those agreements. For other volunteers, including student volunteers, file the SFs 50 documenting the beginning and ending of volunteer service on the right side of an Official Personnel Folder (OPF), along with a resume from the volunteer and a brief statement of the services performed. Follow the instructions in FPM Supplement 293-31 to send the OPF to the National Personnel Records Center when the service is terminated. If an agency wishes to supplement the SF 50 with an SF 7, Service Record Card, it must be annotated to show that the individual did not receive a Federal appointment and the purposes, if any, for which the service is considered to be Federal service. ♦

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APPENDIX K

HEW-579 REAL PROPERTY SURVEY REPORT

HEW-578 (7/71)

DEPARTMENT OF
HEALTH, EDUCATION, AND WELFARE

REAL PROPERTY SURVEY REPORT

1. DATE OF REPORT	2. REPORT NO.	3. PAGE OF PAGES
4. ACCOUNTABLE AREA NUMBER		
5. STATION		
6. LOCATION		

7. DESCRIPTION OF PROPERTY

A. USAGE CODE	B. CLASSIFICATION	C. ACQUISITION COST
---------------	-------------------	---------------------

D. OTHER IDENTIFYING AND DESCRIPTIVE DATA

8. REPORT AND RECOMMENDATION/S

a. Explanation of circumstances necessitating survey action: (Include estimates as to the cost of repairs in cases involving damaged or deteriorated property; information concerning the screening of Government or non-Government activities in the area for transfer, sale or donation of the property; and, in the case of damage or destruction of property attach copy of memorandum report of person responsible for custody of the property.)

b. Recommendations:

(Signature of Real Property Unit Manager)

(Date)

9. FINDINGS AND RECOMMENDATIONS OF BOARD OF SURVEY

All available evidence and testimony having been considered, the findings and recommendation of the Board of Survey are as follows:

a. Findings

b. Recommendation/s:

DATE _____

CHAIRMAN:

MEMBER:

MEMBER:

(Signature)

(Signature)

(Signature)

(Title)

(Title)

(Title)

10. DETERMINATION OF REVIEWING AUTHORITY

The recommendations of the Board of Survey are approved in detail, or as modified in the following respects:

(Signature and Title of Reviewing Authority)

(Date)

11. CERTIFICATION OF FINAL ACTION

I certify that the action/s recommended by the Board of Survey, as approved or certified by determination of the Reviewing Authority, has been accomplished, that any destruction ordered has been accomplished in the presence of at least one witness who is an officer or employee and whose signature appears below, and that the property accountability records have been properly adjusted if the nature of the action taken so warranted.

SIGNATURE OF REAL PROPERTY UNIT MANAGER

DATE

a. METHOD OF DISPOSAL (other than destruction)

DISPOSAL DOCUMENT NO.

NAME AND ADDRESS OF RECIPIENT

Action was
finished in
days

SIGNATURE OF WITNESS

DATE

TITLE

INDICATE NATURE AND EXTENT OF DESTRUCTION

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APPENDIX L

HHS-342 REPORT OF SURVEY FOR PERSONAL PROPERTY

DEPARTMENT OF HEALTH, AND HUMAN SERVICES

REPORT OF SURVEY

(See Instructions §103-25.51
HHS Materiel Management Manual)

REPORT
NUMBER _____
DATE OF
REPORT _____
PAGES IN
REPORT _____

1. _____ TO: _____	2. INDICATE ACCOUNTABLE AREA INVOLVED _____
-----------------------	---

3. THE ITEMS LISTED BELOW WERE:					
<input type="checkbox"/> LOST		<input type="checkbox"/> SHORT ON INVENTORY		<input type="checkbox"/> OTHER	
<input type="checkbox"/> DAMAGED		<input type="checkbox"/> DESTROYED			
IDENTIFICATION OR ITEM NUMBER	DESCRIPTION OR NOMENCLATURE	UNIT	UNIT COST	QUANTITY	TOTAL COST
					GRAND TOTAL
					\$ _____

4. EXPLANATION (See instructions)

Initiator _____ (Signature) _____ (Title) _____ (Date)

5. ADDITIONAL INFORMATION (See instructions)

Prop. Mgmt. or
Accountable
Officer _____ (Name) _____ (Title) _____ (Date)

6. APPOINTING ACTION. The individual(s) named below shall constitute a Board of Survey and shall investigate the above matter (item 1) in accordance with the HHS Materiel Management Manual §103-25.51.

CHAIRMAN (OR SURVEY
OFFICER)

RECORDER

MEMBER

MEMBER

MEMBER

Appointing
Official

(Signature)

(Title)

(Date)

7. FACTS, CONDITIONS, FINDINGS, ETC. of the Board-of-Survey or Survey Officer.

(Signature, Chairman or Survey Officer)

(Date)

(Recorder)

(Date)

(Member)

(Date)

(Member)

(Date)

(Member)

(Date)

(Member)

(Date)

8. DETERMINING AUTHORITY CONCLUSIONS:

Determining
Authority

(Signature)

(Title)

(Date)

9. FINAL ACTION: I certify that the instructions of the Determining Authority regarding disposition of the property have been accomplished and appropriate disposal action taken or abandonment or destruction has been accomplished and witnessed as indicated. Property Accountability records have been properly adjusted and voucher(s) processed to adjust the fiscal records.

Property Mgmt. or
Notable Official

(Signature)

(Date)

ACTION OR ABANDONMENT WAS ACCOMPLISHED IN MY PRESENCE

(Signature)

(Title)

(Date)

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APPENDIX M

OMB CIRCULAR A-25



THE DIRECTOR

EXECUTIVE OFFICE OF THE PRESIDENT
OFFICE OF MANAGEMENT AND BUDGET
WASHINGTON, D.C. 20503
July 8, 1993

CIRCULAR NO. A-25
Revised
Transmittal Memorandum No. 1

TO THE HEADS OF EXECUTIVE DEPARTMENTS AND ESTABLISHMENTS

SUBJECT: User Charges

Circular No. A-25 established guidelines for Federal agencies to assess fees for Government services and for the sale or use of Government property or resources. This Memorandum transmits the revised Circular to clarify Federal policy in light of thirty years of experience and to update the procedures by which agencies are to institute charges.

This Circular rescinds OMB Circular A-25 dated September 23, 1959, and Transmittal Memoranda 1 and 2.



Leon E. Panetta
Director

Attachment

MEMORANDUM FOR HEADS OF EXECUTIVE DEPARTMENTS AND ESTABLISHMENTS

SUBJECT: User charges

1. **Purpose:** The Circular establishes Federal policy regarding fees assessed for Government services and for sale or use of Government goods or resources. It provides information on the scope and types of activities subject to user charges and on the basis upon which user charges are to be set. Finally, it provides guidance for agency implementation of charges and the disposition of collections.

2. **Rescission:** This rescinds Office of Management and Budget Circular No. A-25, dated September 23, 1959, and Transmittal Memoranda 1 and 2.

3. **Authority:** Title V of the Independent Offices Appropriations Act of 1952 (31 U.S.C. 9701); 31 U.S.C. 1111; and Executive Orders No. 8248 and No. 11,541.

4. **Coverage:**

a. The provisions of this Circular cover all Federal activities that convey special benefits to recipients beyond those accruing to the general public. The Circular does not apply to the activities of the legislative and judicial branches of Government, or to mixed-ownership Government corporations, as defined in 31 U.S.C. 9701.

b. The provisions of the Circular shall be applied by agencies in their assessment of user charges under the IOAA. In addition, this Circular provides guidance to agencies regarding their assessment of user charges under other statutes. This guidance is intended to be applied only to the extent permitted by law. Thus, where a statute prohibits the assessment of a user charge on a service or addresses an aspect of the user charge (e.g., who pays the charge; how much is the charge; where collections are deposited), the statute shall take precedence over the Circular. In such cases (e.g., sale or disposal under Federal surplus property statutes; or fringe benefits for military personnel and civilian employees), the guidance provided by the Circular would apply to the extent that it is not inconsistent with the statute. The same analysis would apply with regard to executive orders that address user charges.

c. In any case where an Office of Management and Budget circular provides guidance concerning a specific user charge area, the guidance of that circular shall be deemed to meet the requirements of this Circular. Examples of such guidance include

the following: OMB Circular No. A-45, concerning charges for rental quarters; OMB Circular No. A-130, concerning management of Federal information resources; and OMB Circular No. A-97, concerning provision of specialized technical services to State and Local governments.

5. Objectives: It is the objective of the United States Government to:

- a. ensure that each service, sale, or use of Government goods or resources provided by an agency to specific recipients be self-sustaining;
- b. promote efficient allocation of the Nation's resources by establishing charges for special benefits provided to the recipient that are at least as great as costs to the Government of providing the special benefits; and
- c. allow the private sector to compete with the Government without disadvantage in supplying comparable services, resources, or goods where appropriate.

6. General policy: A user charge, as described below, will be assessed against each identifiable recipient for special benefits derived from Federal activities beyond those received by the general public. When the imposition of user charges is prohibited or restricted by existing law, agencies will review activities periodically and recommend legislative changes when appropriate. Section 7 gives guidance on drafting legislation to implement user charges.

a. Special benefits

(1) Determining when special benefits exist. When a service (or privilege) provides special benefits to an identifiable recipient beyond those that accrue to the general public, a charge will be imposed (to recover the full cost to the Federal Government for providing the special benefit, or the market price). For example, a special benefit will be considered to accrue and a user charge will be imposed when a Government service:

(a) enables the beneficiary to obtain more immediate or substantial gains or values (which may or may not be measurable in monetary terms) than those that accrue to the general public (e.g., receiving a patent, insurance, or guarantee provision, or a license to carry on a specific activity or business or various kinds of public land use); or

(b) provides business stability or contributes to public confidence in the business activity of the beneficiary (e.g., insuring deposits in commercial banks); or

(c) is performed at the request of or for the convenience of the recipient, and is beyond the services regularly received by other members of the same industry or group or by the general public (e.g., receiving a passport, visa, airman's certificate, or a Custom's inspection after regular duty hours).

(2) Determining the amount of user charges to assess.

(a) Except as provided in Section 6c, user charges will be sufficient to recover the full cost to the Federal Government (as defined in Section 6d) of providing the service, resource, or good when the Government is acting in its capacity as sovereign.

(b) Except as provided in Section 6c, user charges will be based on market prices (as defined in Section 6d) when the Government, not acting in its capacity as sovereign, is leasing or selling goods or resources, or is providing a service (e.g., leasing space in federally owned buildings). Under these business-type conditions, user charges need not be limited to the recovery of full cost and may yield net revenues.

(c) User charges will be collected in advance of, or simultaneously with, the rendering of services unless appropriations and authority are provided in advance to allow reimbursable services.

(d) Whenever possible, charges should be set as rates rather than fixed dollar amounts in order to adjust for changes in costs to the Government or changes in market prices of the good, resource, or service provided (as defined in Section 6d).

(3) In cases where the Government is supplying services, goods, or resources that provide a special benefit to an identifiable recipient and that also provide a benefit to the general public, charges should be set in accordance with paragraph (2) of Section 6a. Therefore, when the public obtains benefits as a necessary consequence of an agency's provision of special benefits to an identifiable recipient (i.e., the public benefits are not independent of, but merely incidental to, the special benefits), an agency need not allocate any costs to the public and should seek to recover from the identifiable recipient either the full cost to the Federal Government of providing the special benefit or the market price, whichever applies.

(4) No charge should be made for a service when the identification of the specific beneficiary is obscure, and the service can be considered primarily as benefiting broadly the general public.

b. Charges to the direct recipient. Charges will be made to the direct recipient of the special benefit even though all or part of the special benefits may then be passed to others.

c. Exceptions

(1) Agency heads or their designee may make exceptions to the general policy if the provision of a free service is an appropriate courtesy to a foreign government or international organization; or comparable fees are set on a reciprocal basis with a foreign country.

(2) Agency heads or their designee may recommend to the Office of Management and Budget that exceptions to the general policy be made when:

(a) the cost of collecting the fees would represent an unduly large part of the fee for the activity; or

(b) any other condition exists that, in the opinion of the agency head or his designee, justifies an exception.

(3) All exceptions shall be for a period of no more than four years unless renewed by the agency heads or their designee for exceptions granted under Section 6c(1) or the Office of Management and Budget for exceptions granted under Section 6c(2) after a review to determine whether conditions warrant their continuation.

(4) Requests for exceptions and extensions under paragraphs (2) and (3) of Section 6c shall be submitted to the Director of the Office of Management and Budget.

d. Determining full cost and market price

(1) "Full cost" includes all direct and indirect costs to any part of the Federal Government of providing a good, resource, or service. These costs include, but are not limited to, an appropriate share of:

(a) Direct and indirect personnel costs, including salaries and fringe benefits such as medical insurance and retirement. Retirement costs should include all (funded or unfunded) accrued costs not covered by employee contributions as specified in Circular No. A-11.

(b) Physical overhead, consulting, and other indirect costs including material and supply costs, utilities, insurance, travel, and rents or imputed rents on land, buildings, and equipment. If imputed rental costs are applied, they should include:

(i) depreciation of structures and equipment, based on official Internal Revenue Service depreciation guidelines unless better estimates are available; and

(ii) an annual rate of return (equal to the average long-term Treasury bond rate) on land, structures, equipment and other capital resources used.

(c) The management and supervisory costs.

(d) The costs of enforcement, collection, research, establishment of standards, and regulation, including any required environmental impact statements.

(e) Full cost shall be determined or estimated from the best available records of the agency, and new cost accounting systems need not be established solely for this purpose.

(2) "Market price" means the price for a good, resource, or service that is based on competition in open markets, and creates neither a shortage nor a surplus of the good, resource, or service.

(a) When a substantial competitive demand exists for a good, resource, or service, its market price will be determined using commercial practices, for example:

(i) by competitive bidding; or

(ii) by reference to prevailing prices in competitive markets for goods, resources, or services that are the same or similar to those provided by the Government (e.g., campsites or grazing lands in the general vicinity of private ones) with adjustments as appropriate that reflect demand, level of service, and quality of the good or service.

(b) In the absence of substantial competitive demand, market price will be determined by taking into account the prevailing prices for goods, resources, or services that are the same or substantially similar to those provided by the Government, and then adjusting the supply made available and/or price of the good, resource, or service so that there will be neither a shortage nor a surplus (e.g., campsites in remote areas).

7. Implementation:

a. The general policy is that user charges will be instituted through the promulgation of regulations.

b. When there are statutory prohibitions or limitations on charges, legislation to permit charges to be established should be proposed. In general, legislation should seek to remove restraints on user charges and permit their establishment under the guidelines provided in this Circular. When passage of this general authority seems unlikely, more restrictive authority should be sought. The level of charges proposed should be based

on the guidelines in Section 6. When necessary, legislation should:

(1) define in general terms the services for which charges will be assessed and the pricing mechanism that will be used;

(2) specify fees will be collected in advance of, or simultaneously with, the provision of service unless appropriations and authority are provided in advance to allow reimbursable services;

(3) specify where collections will be credited (see Section 9). Legislative proposals should not normally specify precise charges. The user charge schedule should be set by regulation. This will allow administrative updating of fees to reflect changing costs and market values. Where it is not considered feasible to collect charges at a level specified in Section 6, charges should be set as close to that level as is practical.

c. Excise taxes are another means of charging specific beneficiaries for the Government services they receive. New user charges should not be proposed in cases where an excise tax currently finances the Government services that benefit specific individuals. Agencies may consider proposing a new excise tax when it would be significantly cheaper to administer than fees, and the burden of the excise tax would rest almost entirely on the user population (e.g., gasoline tax to finance highway construction). Excise taxes cannot be imposed through administrative action but rather require legislation. Legislation should meet the same criteria as in Section 7b; however, it is necessary to state explicitly the rate of the tax. Agency review of these taxes must be performed periodically and new legislation should be proposed, as appropriate, to update the tax based on changes in cost. Any excise tax proposals must be approved by the Assistant Secretary for Tax Policy at the Department of the Treasury.

d. When developing options to institute user charges administratively, agencies should review all sources of statutory authority in addition to the Independent Offices Appropriations Act that may authorize implementation of such charges.

e. In proposing new charges or modifications to existing ones, managers of other programs that provide special benefits to the same or similar user populations should be consulted. Joint legislative proposals should be made, and joint collection efforts designed to ease the burden on the users should be used, whenever possible.

f. Every effort should be made to keep the costs of collection to a minimum. The principles embodied in Circular No. A-76

(Performance of Commercial Activities) should be considered in designing the collection effort.

g. Legislative proposals must be submitted to the Office of Management and Budget in accordance with the requirements of Circular No. A-19. To ensure the proper placement of user fee initiatives in the budget account structure, agencies are encouraged to discuss proposals with OMB at an early stage of development.

8. Agency responsibility: Agencies are responsible for the initiation and adoption of user charge schedules consistent with the policies in this Circular. Each agency will:

- a. Identify the services and activities covered by this Circular;
- b. Determine the extent of the special benefits provided;
- c. Apply the principles specified in Section 6 in determining full cost or market price, as appropriate;
- d. Apply the guidance in Section 7 either to institute charges through the promulgation of regulations or submit legislation as appropriate;
- e. Review the user charges for agency programs biennially, to include: (1) assurance that existing charges are adjusted to reflect unanticipated changes in costs or market values; and (2) a review of all other agency programs to determine whether fees should be assessed for Government services or the user of Government goods or services. Agencies should discuss the results of the biennial review of user fees and any resultant proposals in the Chief Financial Officers Annual Report required by the Chief Financial Officers Act of 1990;
- f. Ensure that the requirements of OMB Circular No. A-123 (Internal Control Systems) and appropriate audit standards are applied to collection;
- g. Maintain readily accessible records of:
 - (1) the services or activities covered by this Circular;
 - (2) the extent of special benefits provided;
 - (3) the exceptions to the general policy of this Circular;
 - (4) the information used to establish charges and the specific method(s) used to determine them; and
 - (5) the collections from each user charge imposed.

(6) Maintain adequate records of the information used to establish charges and provide them upon request to OMB for the evaluation of the schedules and provide data on user charges to OMB in accordance with the requirements in Circular No. A-11.

9. Disposition of collections:

a. Unless a statute provides otherwise, user charge collections will be credited to the general fund of the Treasury as miscellaneous receipts, as required by 31 U.S.C. 3302.

b. Legislative proposals to permit the collections to be retained by the agency may be appropriate in certain circumstances. Proposals should meet the guidelines in Section 7b.

Proposals that allow agency retention of collections may be appropriate when a fee is levied in order to finance a service that is intended to be provided on a substantially self-sustaining basis and thus is dependent upon adequate collections.

(1) Generally, the authority to use fees credited to an agency's appropriations should be subject to limits set in annual appropriations language. However, it may be appropriate to request exemption from annual appropriations control, if provision of the service is dependent on demand that is irregular or unpredictable (e.g., a fee to reimburse an agency for the cost of overtime pay of inspectors for services performed after regular duty hours).

(2) As a normal rule, legislative proposals that permit fees to be credited to accounts should also be consistent with the full-cost recovery guidelines contained in this Circular. Any fees in excess of full-cost recovery and any increase in fees to recover the portion of retirement costs which recoups all (funded or unfunded) accrual costs not covered by employee contributions should be credited to the general fund of the Treasury as miscellaneous receipts.

10. New activities: Whenever agencies prepare legislative proposals for new or expanded Federal activities that would provide special benefits, the policies and criteria set forth in this Circular will apply.

11. Inquiries: For information concerning this Circular, consult the Office of Management and Budget examiner responsible for the agency's budget estimates.